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Andree Mohr, president of Integrated Partners, reflects on how working through a misstep led to a life lesson — one that built a foundation for a solid career. *Contributed photo, with design by Sena Kwon*

The Ladder: How owning an error led to career growth for Andree Mohr
By Rob Burgess
September 26, 2024, 3:17 p.m. EDT

Welcome to the latest installment of The Ladder, a series by Financial Planning that looks at how executives and leaders in the wealth management industry made it to where they are today — and what you can learn from them.

Andree Mohr has an impressive backstory.

In under 15 years, she went from marketing coordinator at a financial services firm to president of an RIA with nearly $20 billion in AUM.

But it was a mistake she made early in her career that led to a moment of growth.

Mohr got her start in the industry while she was an undergraduate at Northeastern University when she began interning at Baystate Financial Services in Boston.

"I loved it," she said. "It was amazing. … Very early on in my career, I constantly asked to be involved in different things, and by doing so, I got to learn different aspects of the business and see how everything tied together."

After graduation, Mohr worked full-time as Baystate's marketing coordinator for a year and a half before moving to Covanta Energy — a waste management company now known as Reworld — to work as a sales and marketing manager for three years. She joined her current firm, Integrated Partners, in 2015 as a director of business development, overseeing its transition to LPL from Lincoln Financial in 2016.

"Especially in finance, there is a sense of competition among advisors and salespeople in general, right? And that is a great way to help motivate people across the organization," she said. "But having collaboration is much more important than having competition, and so through the process of transitioning the firm, we focused heavily on collaboration and leaning on each other for support."

It was during this period nearly 10 years ago that a mistake on her part ultimately ended up getting an advisor at the firm flagged in a compliance review.

"They were going to get a letter of caution from the firm, but it was a mistake that I had made," she said.

Mohr decided to make others aware of the fact that it was her error that caused the issue."People have always said the cover-up can be worse than the crime, so you need to always just own up to your mistakes," she said. "But by calling our chief compliance officer and owning up to the mistake that I made, we could work out a plan together."

Ultimately, the situation was resolved with no negative consequences for the advisor.

"It felt like a huge deal for me back then to be like, 'I messed something up, and maybe I'm going to get in trouble,'" she said. "I was also young. I was like 26 years old. So those things felt very big at that time. And so to have somebody in our firm say, 'Thank you for coming forward,' helped me evolve as a person to understand that failure is important. Making a mistake and owning up to your mistakes is OK, as long as you ultimately learn from them, but those uncomfortable moments are what help you grow and evolve."

As her work history at Integrated Partners proves, that mistake didn't cost Mohr the trust of her firm; if anything, owning the error seems to have had the opposite effect. Mohr was promoted to vice president of strategy and development in 2017, and then chief implementation officer in 2020. She was named president of the firm in April 2024.

"I always try to focus on things that we can control," she said. "You've got to let go of the things you can't influence or control. If you can influence or control something, you've always got to follow up and tell people what's going on, communicate with them so they feel heard and they feel like you care about them."